

12/2016



# University SHRA Annual Performance Appraisal Form

<b>ANNUAL PERFORMANCE APPRAISAL CYCLE</b> (Dates From/To):		April 1, 2016	to	March 31, 2017
<b>Dept. Name:</b>	Budget Office	<b>Employee Name:</b>	Lisa Bernard	
<b>Dept. #:</b>	2320	<b>Employee ID:</b>	830023596	<b>Position #:</b> 90
<b>Supervisor Name:</b>	Steve Mack	<b>Employee Classification:</b>	Accounting Tech	
<b>Supervisor Title:</b>	Budget Director	<b>Competency Level:</b>	Journey	

## PART 7: ANNUAL PERFORMANCE APPRAISAL

(see instructions on page 2)

- Rate each **Individual and Institutional Goal**.
  - 1 = Not Meeting Expectations
  - 2 = Meeting Expectations
  - 3 = Exceeding Expectations
- Multiply the **Weight** by the **Rating** to get the **Score** for each goal. Use two decimal places. (Example: 10% x 2 = 0.20)
- Add all of the **Scores** together to assign a **Final Overall Rating**.
  - 1.00 to 1.69 = Not Meeting Expectations
  - 1.70 to 2.69 = Meeting Expectations
  - 2.70 to 3.00 = Exceeding Expectations
- Provide **comments** and **signatures** on the next page.

#	INSTITUTIONAL GOALS (see descriptions in performance plan)	Weight	x	Rating	=	Score
1	Expertise	10	x	3	=	30
2	Accountability	10	x	3	=	30
3	Customer-Oriented	10	x	3	=	30
4	Team-Oriented	10	x	3	=	30
5	Compliance & Integrity	10	x	3	=	30
6	Supervision (if applicable)		x		=	

#	INDIVIDUAL GOALS (title only from performance plan)	Weight	x	Rating	=	Score
1	Process PPA Forms, Track Positions, People Admin Processing	25	x	3	=	75
2	Prepare Quarterly Vacancy Report	10	x	2	=	20
3	Budget Management	15	x	2	=	30
4			x		=	
5			x		=	

<b>FINAL OVERALL RATING</b> (mark the appropriate rating based on total score)		<b>TOTAL SCORE</b> =	275
Has the employee received a disciplinary action during this performance cycle and/or received any rating of 1 (Not Meeting Expectations) on this appraisal? If <b>YES</b> , then the final overall rating <b>cannot</b> equal Exceeding Expectations, regardless of the total score.			YES
			<b>NO</b>
NOT MEETING EXPECTATIONS	MEETING EXPECTATIONS	EXCEEDING EXPECTATIONS	2.75